



User Guide



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1 Installation

ViewPermit uses a self-updating deployment technology to install with minimal user interaction. Once installed, ViewPermit checks for newer versions as they become available and automatically replaces any updated files.

- 1.1 Open Microsoft Internet Explorer and enter the URL provided by your System Administrator. Typically, the following web page will appear:

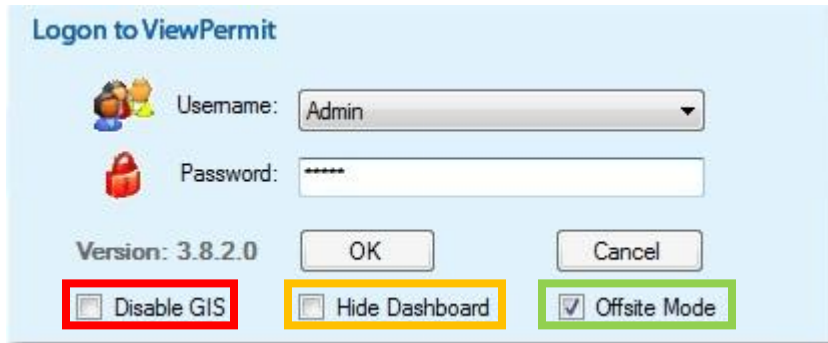


- 1.2 Click the "Install" button and follow the instructions on your screen. ViewPermit will launch automatically upon completion of the installation procedure.

2 Security Login

ViewPermit supports active directory and adapts itself based on the logged-in user and the administrative group he/she belongs to. Users will see their own inspections, project reviews and other tasks based on their login ID.

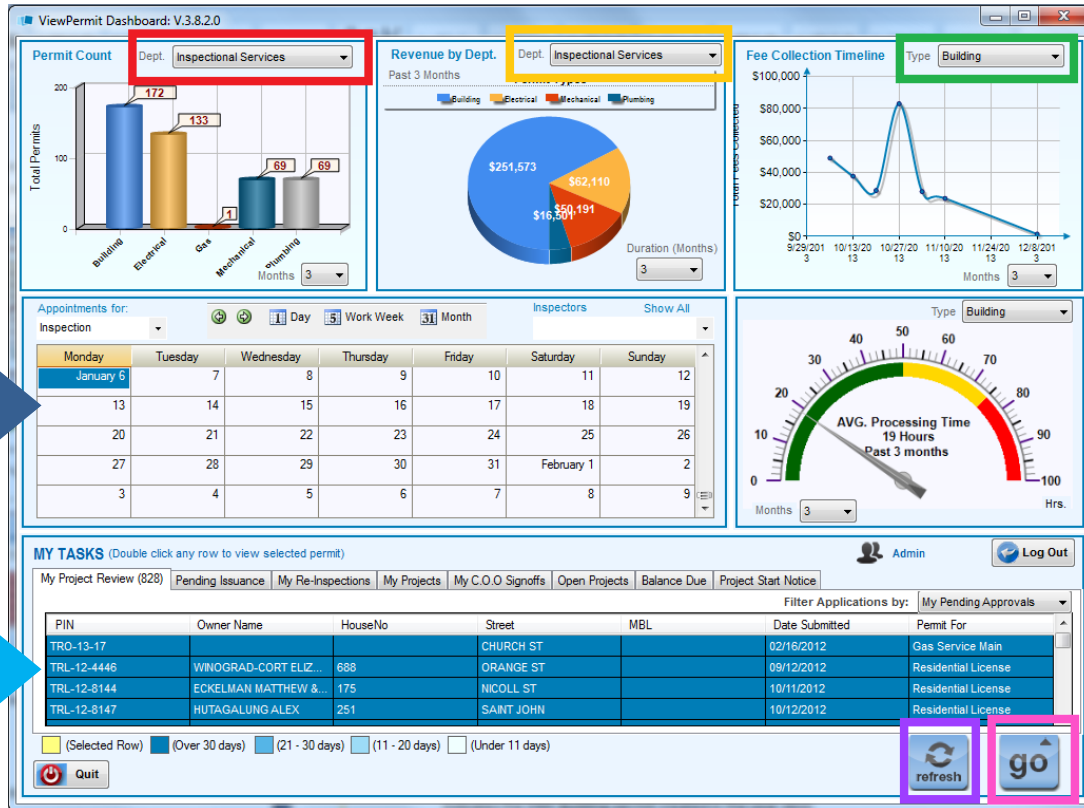
- 2.1 The User Login screen is displayed upon launching the program immediately after the splash screen:



- 2.2 Type or select your username and type your password. If your municipality has chosen to use Lightweight Directory Access Protocol (LDAP), this feature will allow users to log in using their network credentials.
- 2.3 If you will not be utilizing GIS during your session you may select the **Disable GIS** box to help the program run more quickly.
- 2.4 To bypass the Dashboard and go directly to the Control Panel, check the box labeled **Hide Dashboard**.
- 2.5 LDAP users only: To bypass LDAP authentication when working off- site, check the box labeled **Offsite Mode**. You may then log in with ViewPermit-specific credentials.

3 Dashboard

The Dashboard provides a summary of the number of permits created, revenue by type of permit, fee collection timeline, average processing time, inspection calendar, and a list of pending applications.



- 3.1 Filter the **Permit Count**, **Revenue by Type**, and **Fee Collection** timeline graphs by department or type by using the corresponding drop-down menus.
- 3.2 Double-click on any permit in the **Pending Applications** table to access the full record.
- 3.3 Double-click on any date in the **Calendar** to view scheduled inspections. To schedule a new inspection, fill in the requisite information and click Save.
- 3.4 Click the **Refresh button** to update the Dashboard to reflect any recent changes. Click the **GO button** to access any of the main **Control Panel** tabs (next page).

4 Control Panel

The Control Panel is an intuitive hub that allows you to create new permits and access, edit, and delete existing permits. Easily search by address, map/lot, permit #, licensee, contractor, owner, or project.

The screenshot shows the ViewPermit Control Panel. On the left, a sidebar contains a search box with fields for Address, Permit #, and Licensee. Below the search box is a tree view showing a hierarchy of permits, with 'M-2002-0013' selected. The main content area displays the details for the selected permit, including Property Info, Permit Info, and various form sections like Stoves / Liquid Storage and Fixtures. The permit is marked as 'Approved' and 'READ-ONLY'.

- 4.1 In the **Search Box**, type an address, map/lot number, permit number, or other search criteria in the top-left selection panel to display all related pending or issued permits in the tree view. Permits are numbered by type of permit, year of creation, and chronology. For example, B-10-15 indicates the 15th Building permit created in the year 2010.
- 4.2 The **Tree View** is color coded to indicate what stage of the process the permit is in. Black text indicates the permit is still pending, green indicates the permit has been issued, and red indicates a closed permit. More detailed status information and dates of actions can be found on the permit form. Click any permit number or icon in the tree view to view permit details in the main form. The tree view visually groups permits with associated parent/child permits. Clicking on a specific permit type will filter for only that type of permit and clicking "All Permits" will show all types again.

- 4.3 To add a new permit, choose a property (or a licensee if you are creating a license) and select the type of permit you wish to add from the **Permit Select** menu.

Note this must be done before you can create a new permit.

Click the ">>" button next to the permit group, and then choose the type of permit to create. Click the "+" button next to the permit type to load a new form in the main window. The **Flags** button will blink red if the property, owner, contractor or permit selected has a flag entered on it. If you click on it you can open up more information on the specific flag or create new rules for flags.



- 4.4 The Owner information will populate automatically based on the address gathering information from your Assessors database. The rest of the information will need to be filled in manually.

Permit Info

Occupancy Type: Building Type: Permit For: Date Submitted: 2/ 1/2013

Water Supply: Public ☒ Private Well ☐ Sewage Disposal System: Municipal ☒ On Site Disposal ☐ Expiration Date: 2/ 1/2013

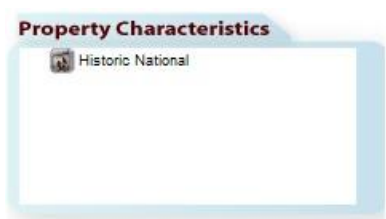
Owner Name: JUNTA FOR PROGRES Address: 169 GRAND AVE City: NEW HAVEN State: CT Zip: 06513 Phone No: () - -

Applicant is: (select one) ☒ Owner ☐ Contractor ☐ Other Project Name:

Applicant Name: Address: City: State: Zip: Phone No: () - -

Applicant Email: Assigned Inspector:

- 4.5 Property setback requirements (if applicable) are displayed based on zoning classification and your community's by-laws. An exclamation mark icon and red highlighted text will warn of a setback violation. Clicking the **Save** button with a violation will trigger a requirement for Zoning Board of Appeals review and will automatically enable the checkbox in the Plan Review module.



4.6 Select the desired contractor from the dropdown list OR add a new one by clicking on the plus button and filling out the required information in the **Personnel Manager**.

Contractor Info

Available Contractors

john

JOHN J. BRENNAN CONSTRUCTION CO. INC.
JOHN J. BRENNAN CONSTRUCTION CO. INC.
ST JOHN ELECTRIC INC

3 Contractor(s) Found

Close

Remove from List

Personnel Manager

Personnel Type

Contractors +
Licensees +
Engineers +
Architects +
Utility +
Security >>

Type or Select Name to Edit
Type Name, DBA, or License #

Contractor

Name DBA

Address City State Zip

Mailing Address (Check if same as Company Address) City State Zip

Phone # Email Address

Mobile Phone # Fax #

Bond

Insurance

General Liability on File Workers Comp. on File

Attach Photo

License Info

* To add a new license fill the boxes below then click the arrow button

License Type License / HIC # License Expiration License Status

License Type License # License Expiration License Status

(License Status Inactive or Revoked) (Selected License) Remove License

Delete Show All Contractors Save

The box on the right will include the types of **licenses held by the contractor** - choose the license that best fits the project and click assign to add the contractor. An exclamation mark icon and red text will warn if a contractor's license has expired.

Contractor Info

Available Contractors

INSTAR SERVICES GROUP

Assigned Contractors (0) **Assign**

Please select a license from the list below

Type	License	Expiration	Status	Local
MCO	MCO.09...	6/30/20...	ACTIVE	False

☐ Homeowner Doing Work
☐ (License Status Inactive or Revoked) ☐ (Selected License)

Remove from List

- 4.7 Click the **Calculate Fee** button to automatically calculate the required permit fee based on the type of work being done. Add a new payment by clicking on the **Add New Payment** button. Fill out the payment information and the Balance Due will automatically update.

Costs & Fees

Project Cost: \$15,000.00

Calculate Fee

Permit Fee: 0 + Additional Fees: \$50.00 = Total Fee: \$50.00

Balance Due: \$50.00

Payment Transactions

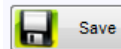
Payment Type	Payment Amount	Payment Status	Check/Acc.#	Account	PaymentID	Date
--------------	----------------	----------------	-------------	---------	-----------	------

Total Paid: \$0.00 **Edit Fee Structure**

- 4.8 Water, Sewer, Drainage, Gas, Mechanical, and Plumbing permits have fixture modules which allow you to display different appliances that are a part of a specific project. These fixtures can also be tied to fees which are added to the fee structure shown above. Select the floor location of the fixture by selecting from the **Location** drop-down menu. Then select the **Type** and **Number** of fixtures being added.

To add a fixture fee simply add the dollar amount into the **Total Fixture Fee** field. You can also add a **Total Demand Factor** in the field below. Press the **Add** button to the right of the **Number** field when finished entering a fixture.

Once all the data has been entered, hit the **Save** button at the bottom of the permit screen.



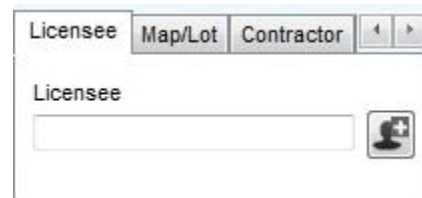
- 4.9 For houses that have not been assigned to addresses in the assessors' database but still need permits, select the **New Address** link below the street and house number fields in the **search box** (pg. 6). Enter the required information and select save. This will add a new, temporary address that you will be able to add permits to. Once the official address has been added to the assessors' database and assuming it is a different address number, click the 'switch address' link that appears for temporary addresses. Enter the official assessor's address that you would like to move existing permits/applications to and save. This will bring all of the permits already created to the new address.

- 4.10 To change the address of a specific permit, click the **Change Address** button in the bottom right corner of the **control panel** (pg. 6).



Express permits can be saved and issued instantly. All other permits receive a temporary number (e.g. TB-10-23) until review by the appropriate departments.

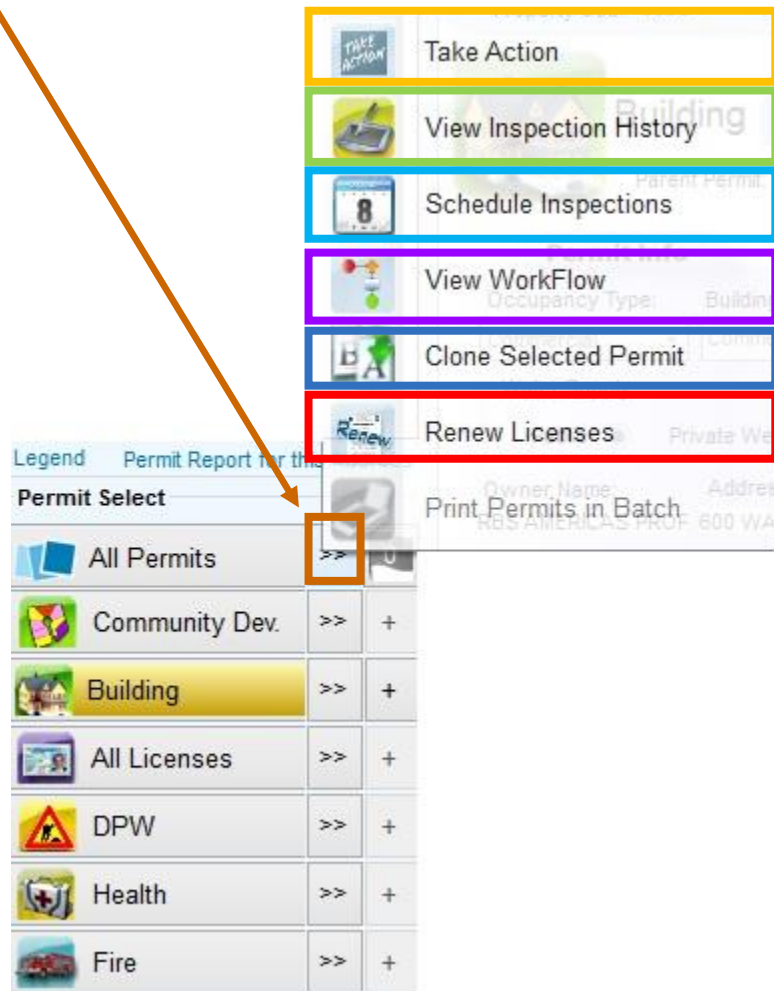
- 4.11 To search for licensees, select the licensee tab in the **search box** (pg. 6) and choose an existing licensee or create a new licensee. Selecting an existing licensee will list the licenses already held under that name. Create a new licensee by clicking the "+" button and filling in the necessary information (Name, Mailing Address, City, State, Zip, Phone Number, and E-mail). Once a licensee is either added or selected, view that particular holder's already existing licenses in the tree view or click the plus button next to the license you wish to create.



- 4.12 The indicator next to the **Edit button** will become red and indicate when you are editing a permit. If not, it will become black and indicate that it is currently in read-only mode.



- 4.13 Click the ">>" button next to **All Permits** to reveal settings for bulk renewals and permit cloning. Choosing **Renew Licenses** will open up the Renew Licenses Panel. You can filter by license type or by date. Simply select the checkboxes of the licenses you would like to renew and click "Renew License(s)." From this menu you can also **Clone** the selected permit to quickly make copies, view the **Workflow** of the permit, **Schedule an Inspection**, **View the History** of inspections or **Take a Custom Action**.



5 Plan Review

All non-express permits (permit number starting with "T") must undergo plan review and approval by the required departments before a permit is issued.

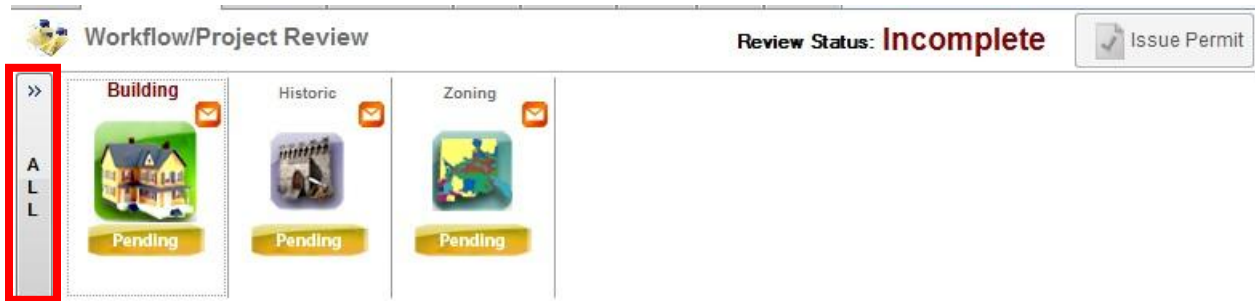
PIN	Owner Name	HouseNo	Street	MBL	DateSubmitted	Permit For
TZ-12-1	SULLIVAN MARGUERIT...	5	WILCOX PL	156 0827 00300	08/10/2012	Use Variance
TB-12-376	STURGES REBEKAH H ...	10	ACADEMY ST	208 0549 01600	09/21/2012	Addition
TB-12-382	MARTIR JORGE	5	MAIN ST	172 0774 01601	12/31/2012	Antennas
TPL-13-1	CITY OF NEW HAVEN P...	0	ACADEMY ST	208 0550 00100	01/11/2013	Certificate of Comple...
TB-13-7	MARTIR JORGE	5	MAIN ST	172 0774 01601	01/18/2013	Antennas
TB-13-8	MARTIR JORGE	5	MAIN ST	172 0774 01601	01/18/2013	Demolition
TPL-13-2	BIRD JEAN D	4	ACADEMY ST	208 0549 01801	01/18/2013	App to Legislative Servi...
TM-13-15	BIRD JEAN D	4	ACADEMY ST	208 0549 01801	01/18/2013	Chimney Liner

5.1 All Pending permits will be displayed in a grid and **colored based on age of permit** when you click the **Show Pending Applications** button at the bottom of the form. Double click any pending permit and ViewPermit will locate the address and load all permit info for review and further processing. Select the **Print Applications** button to print this table.

5.2 Pending permits can be sorted by clicking the header of any **Attribute Field** (PIN, OwnerName, HouseNo, etc).

5.3 The issuing department will be required to conduct plan review by default.

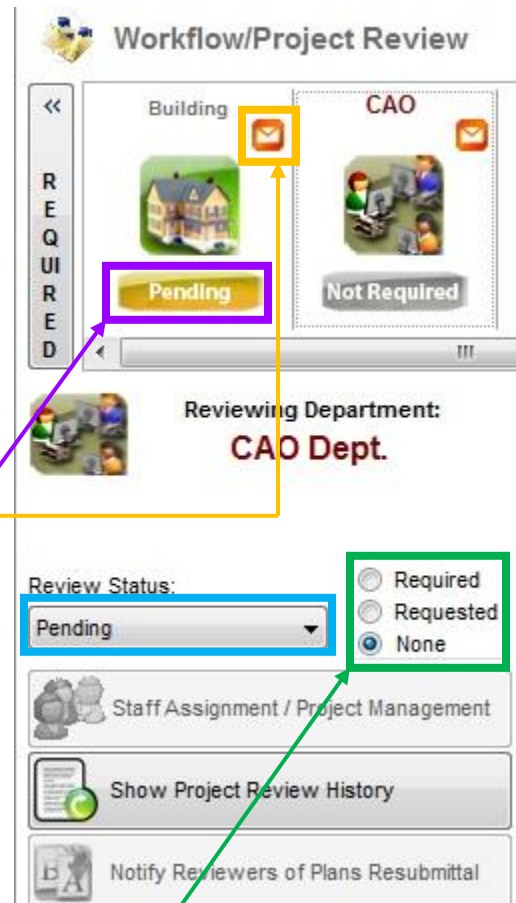
- 5.4 To the left of the required department icons you will notice a button that says 'All'. Clicking this button will show all departments even if they aren't currently required to sign off on the permit.



- 5.5 You can either require or request other Departments to conduct plan review. All "required" departments must either approve or conditionally approve a permit application before it can be issued. Add a required department by clicking on the appropriate icon at the top of the plan review page.

- 5.6 Next, select a permit **Review Status** from the **dropdown list**. Once a review has been completed the **Review Status** will change. This can be found below each department icon and will read either pending, not required, approved, or denied. Also located next to each department icon is an orange **E-mail Button** that lists the reviewers from each department and allows for simple e-mailing back and forth inter-departmentally.

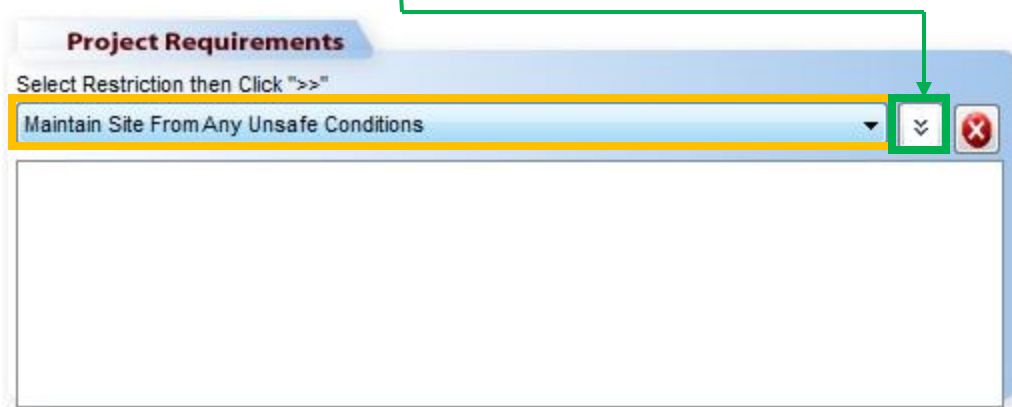
- 5.7 After selecting both the user and review status you can specify whether the review is **Required, Requested, or None**. This lets the software know the importance of this department's or user's necessity in passing the project along. A required reviewer must give a status for the project to move to the next step whereas a requested reviewer is optional.



- 5.8 You can add plans and documents to the review by clicking on the **Attach New File** button within the Attach Plans/Documents box.



- 5.9 Choose **Restrictions from the dropdown list** or write in a new restriction and add the restriction by clicking the **Downward Arrow** button.



- 5.10 Any property setback violations will trigger Zoning Board of Appeals review. The GIS module within ViewPermit automatically performs spatial geo-processing to highlight property restrictions and further reviews. The GIS will trigger reviews for any area specified during the initial setup of the software. This could include wetlands, historical districts and flood zones.

- 5.11 At the bottom of the screen select the **"Show Pending Applications"** button to list all of the applications that will require your sign-off.



Pending Applications for Review (36) Filter Applications by: My Pending Approvals

PIN	Owner Name	HouseNo	Street	MBL	DateSubmitted	Permit For
TB-11-96	NEIGHBORHOOD ...	17	BASSETT ST	254 0503 01900	04/12/2011	Rehab-Residential
TB-11-97	BANK OF NEW Y...	27	BASSETT ST	254 0503 02300	04/12/2011	Rehab-Residential
TB-11-777	MUTUAL HOUSIN...	257	GRAND AV	167 0756 01800	08/26/2011	New Constructio...
TB-12-43	SMITH ARTHUR E...	78	BYRON PL	413 1246 00400	01/13/2012	Rehab-Residential
TOB-12-106			WALL ST		04/12/2012	Other
TOB-12-107			WALL ST		04/12/2012	Other
TOB-12-108			CHURCH ST		04/12/2012	Other
TOB-12-109			TEMPLE ST		04/12/2012	Other

Buttons: Refresh, Print Applications, Hide Pending Applications, Generate Package

Legend: (Selected Application) (Over 30 Days) (21 - 30 Days) (11 - 20 Days) (Under 11 Days)

- 5.12 Click the **Refresh** button to ensure that all newly added applications by other departments are shown on your "Pending Applications" list.
- 5.13 To the right of the bottom right of the form is the **Generate Package** button which allows you to print all attached documents instantly.
- 5.14 Click the "+" button in the comments section to bring up the **New Comment Box**. Add a title and your comment in the space provided and save. The comment will show with a date and the name of the reviewer.

Review For: TB-13-10 Review Date: 2/1/2013

Buttons: Email Project Reviewers, Email Applicant, Save Review

Comments Section:

Title	Date	Reviewer	Private
Comment	2/4/2013	Admin	

New Comment Dialog Box:

Title: [] Private Comment: []

Comment: []

Buttons: Cancel, Save

- 5.15 Click on the **Comment** to preview the text in the box to the right.

New Comment

Title: [] Private Comment: []

Comment: []

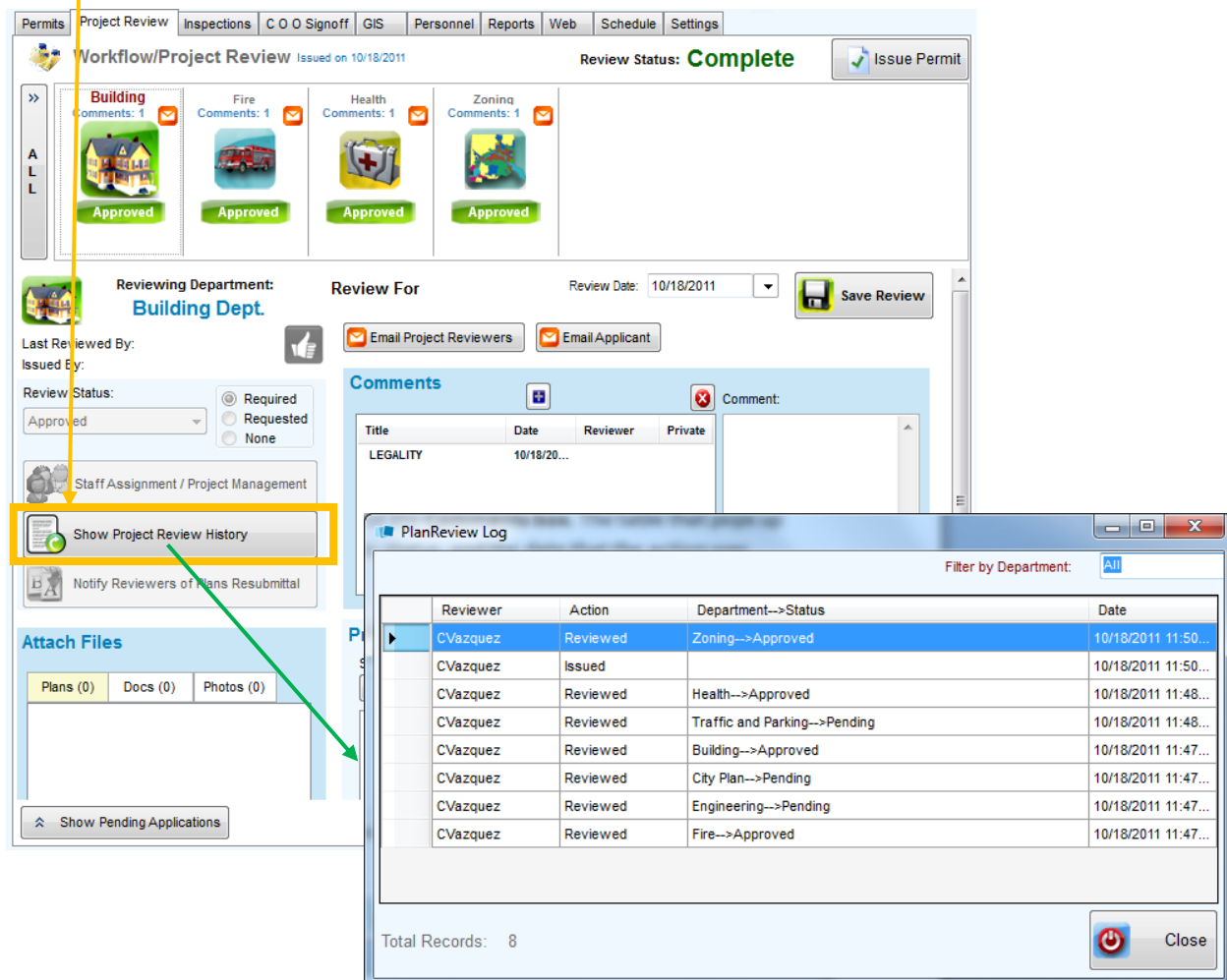
Buttons: Cancel, Save

5.16 Once the Plan Review is completed by all required departments click the **Issue Permit** button.



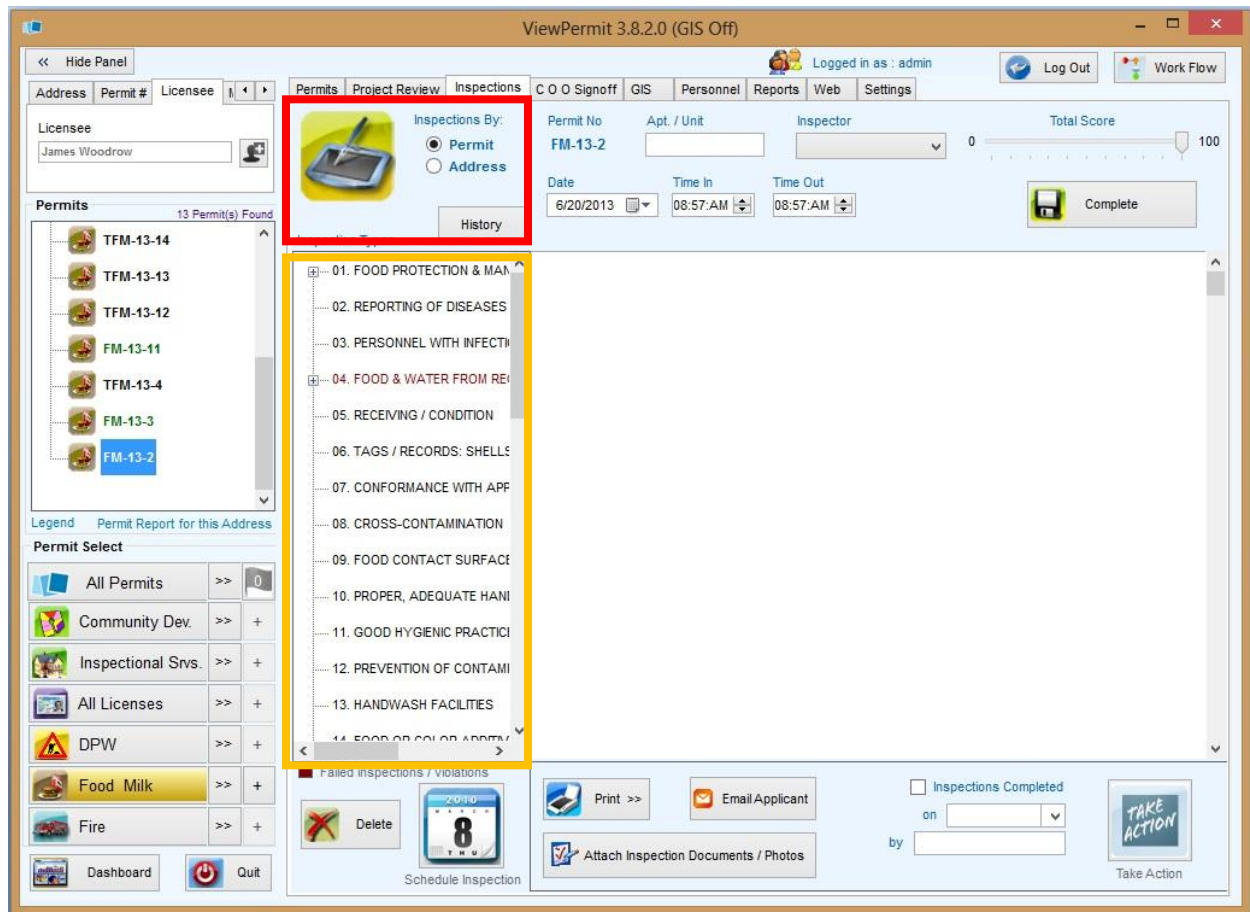
5.17 You will be able to view all comments and permit status by other departments however you can only edit the sections authorized by your department.

5.18 Finally, a review log allows users to see the history of each department's sign-off. Click the **Show Project Review History** button to the left of the **Comments** box. The **Printable Table** that pops up shows the reviewer, action, department and its status, and date the action was taken.



6 Inspections

All existing inspections pertaining to a specific permit will be displayed automatically.



- 6.1 First choose an **Inspections By** Permit or Address. Choose "Address" only if inspecting a property as a whole rather than an individual permit inspection. Once the **Inspections By** has been selected, select an **Inspection Type** from the tree view. These may be different depending on the choice of **Inspections By**.

The screenshot shows a web application interface. On the left, there is a vertical list of inspection types, including '01. FOOD PROTECTION & MA...', '02. REPORTING OF DISEASES', '03. PERSONNEL WITH INFECTION', '04. FOOD & WATER FROM RE...', '05. RECEIVING / CONDITION', '06. TAGS / RECORDS: SHELLS', '07. CONFORMANCE WITH APP', '08. CROSS-CONTAMINATION', '09. FOOD CONTACT SURFACE', '10. PROPER, ADEQUATE HAN...', '11. GOOD HYGIENIC PRACTICE', '12. PREVENTION OF CONTAM...', '13. HANDWASH FACILITIES', and '14. FOOD OR COLOR AD...', with a scroll bar on the right. Below this list is a toolbar with several buttons: 'Delete' (with a red X icon), 'Schedule Inspection' (with a calendar icon showing '2010 MAR 8 THU'), 'Print >>' (with a printer icon), 'Email Applicant' (with an envelope icon), 'Attach Inspection Documents / Photos' (with a document icon), 'Inspections Completed' (with a checkbox), 'by' (with a text input field), and 'TAKE ACTION' (with a blue button labeled 'TAKE ACTION'). A green arrow points to the 'Print >>' button.

- 6.2 Select type of inspection from the list, prompting the inspection form to appear on right. This form can also be **printed** using the button located at the bottom of the screen.

- 6.3 Select **Inspector Name** from dropdown list. The default **Inspection Date** is automatically set to today's date. Enter a different date if required.

The screenshot shows a form titled 'New Foundation Inspection'. On the left, there is a sidebar with 'Inspection Types' and a 'Inspections By:' section with radio buttons for 'Permit' and 'Address'. The main form area contains fields for 'Date' (set to '2/ 4/2013'), 'Time In' (set to '12:58:36 PM'), 'Time Out' (empty), and 'Inspector' (a dropdown menu). A 'Save Inspection' button is on the right. Below these fields, there is a 'Permit No: TB-13-10' and a 'Requires Follow Up' checkbox. A purple arrow points to the 'Date' field, and a blue arrow points to the 'Inspector' dropdown menu.

- 6.4 Begin filling out inspection by selecting **Status**. Inspection records that require **Follow up** are highlighted in yellow. Enter necessary **Comments** and finish by clicking the **Complete** button at the top right.

The screenshot displays the ViewPermit inspection interface. On the left, a list of inspection items is shown, with item 2-201.13 highlighted in yellow. The main area shows the details for this item, including a 'Status' dropdown menu (set to 'Pass'), a 'Comment' field, and a 'Comments' text area. A green arrow points to the 'Complete' button at the top right. A red arrow points to the 'Status' dropdown menu. A blue arrow points to the '3/27/2013 11:24:04 AM' timestamp.

The **Saved Inspection** will be shown under the list of specific inspections on the left and can be edited in the future. The date and time are captured for the particular inspection.

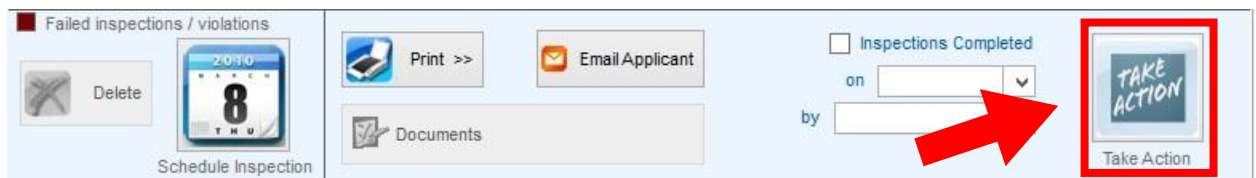
- 6.5 Once an inspection is completed, select the **Inspections Complete** box.

The screenshot shows the bottom section of the ViewPermit interface. It includes a 'Failed inspections / violations' section with a 'Delete' button and a 'Calendar' button. The 'Calendar' button is highlighted with a blue box. To the right, there is a 'Print >>' button, an 'Email Applicant' button, and a 'Documents' button. The 'Inspections Completed' checkbox is highlighted with a yellow box. Below it, there are 'on' and 'by' fields. A 'TAKE ACTION' button is also visible.

Use the **Calendar** located at the bottom of the screen to schedule new inspections or view other inspections already scheduled.

6.6 If at the end of the inspection process there is further inspection required, select the 'requires follow up' check box in the top right corner of the form.


6.7 Select the print button to open a call-out list that allows for a number of different printing options. Select the 'Selected Inspection' option to print only those individual inspection items on the inspection checklist that were changed. Select 'Permit Inspection Report' to print all individual inspection instances no matter what the inspection item. Finally, select the permit inspections template to print the entire inspection template for the entire project.



6.8 The **Take Action** button will allow you to perform any number of actions set up for the particular permit-for that is open. In this particular example you will see the standard actions for all permits (Certificate of Compliance, Certificate of Inspection, Stop Work Order and Violation Letter) as well as one specific to a Food and Milk inspection, the **Food Establishment Inspection Report**. This item will only be available when you select "Take Actions" while in a Food and Milk license. These reports may be customized with the help of ViewPoint.



Using essentially the same format as the Project Review, the COO Signoff is a way for required officials to review work and signoff for Certificate of Occupancy and Temporary Certificate of Occupancy.



- 7.1 All **pending permits** will be displayed in a grid and **colored based on age** of permit. Double click any pending permit and ViewPermit will locate the address and load all permit info for review and further processing. Pending permits can be sorted by clicking any of the column headers. Remember to click the "Refresh Permits" button to make sure all newly added applications appear in your pending applications section.

 Refresh Permits
  Print
  (Selected Application)
  (Over 30 days)
  (21 - 30 days)
  (11 - 20 days)
  (Under 11 days)

7.2 Users added to COO Signoff security under Personnel->Security (setup detailed on pg. 28) will be required to sign off on particular permits.

7.3 You can either require or request other Departments to conduct COO Signoff. All **Required** departments must either approve or conditionally approve a permit application before it can be issued. Add a required department by clicking on the appropriate selection.

7.4 Once a department is selected, select the signoff status from the dropdown list. The status will be shown on the **Work Flow Status Bar** which is color coded to depict different stages of the permit review process. This can be found below each department icon and will read either pending, not required, approved, or declined.

The screenshot displays the ViewPermit interface. At the top, there are two department cards: 'Building' (with a house icon) and 'City Plan' (with a group of people icon). Both cards have a 'Pending' status bar at the bottom. A yellow box highlights the 'Pending' status bar for the 'Building' department, with a yellow arrow pointing to it from the text in step 7.4. Below the department cards, the 'Reviewing Department' is set to 'Building Dept.'. Underneath, it says 'Last Reviewed By: Admin'. To the right, there is a 'Review Log' button with a document icon. At the bottom, there is a 'Signoff Status' dropdown menu currently set to 'Pending'. To the right of the dropdown is a radio button selection area with three options: 'Required' (selected with a blue dot), 'Requested' (with a grey dot), and 'None' (with a grey dot). This radio button area is enclosed in a red box, with a red arrow pointing to it from the text in step 7.3.

- 7.5 You can add comments to the COO Signoff by clicking on the "+" button within the comments box.

Reviewing Department: **Building Dept.**

Signoff For: **TPL-13-5**

Date: 6/20/2013

Save

Signoff Status: Pending

Required
Requested
None

Building Code Year: Days: 90

Open Permits for C.O.O Sign off: (0)

Take Action

- 7.6 Once the required reviewers have signed-off on the particular projects and these sign-offs have been saved, the **Take Action** button will be enabled, allowing you to print a **COO** or a **TCO**.

Take Action on B-13-12 at 13 WITCHCRAFT ROAD

Show All Action History Close

Certificate of Compliance

Certificate of Inspection

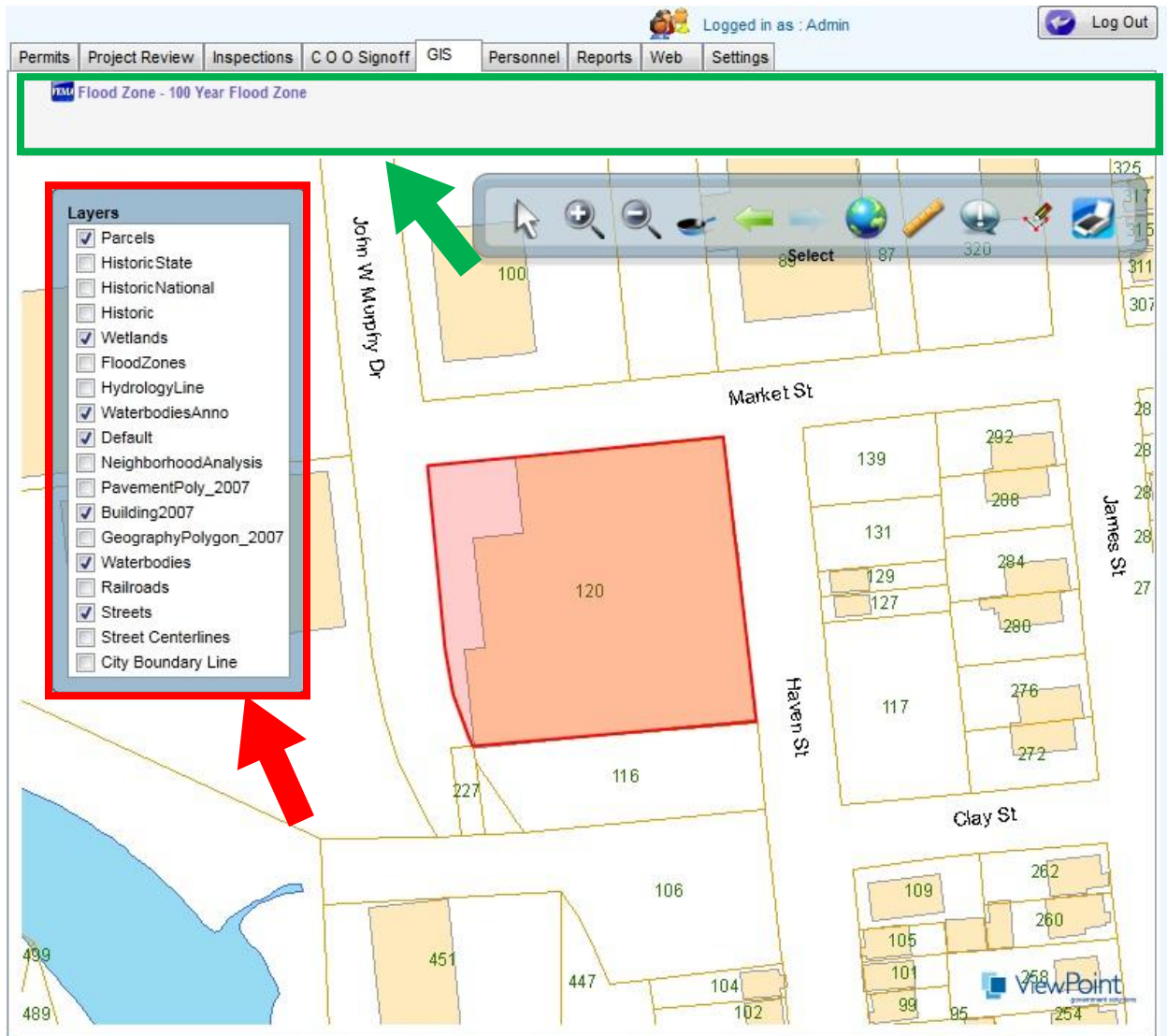
Occupancy Certificate

Stop Work Order

Temporary C.O.

- 7.7 For TCO documents that include a **Limit on Number of Days** there is a field that allows users to set the number. By default the number is set to 90 days. The field located to the left enables users to specify the **Building Code Year** for each COO.

8 Geographic Information Systems (GIS)



- 8.1 Upon selecting a street name and house number or a Parcel ID, the GIS map will zoom in to and highlight the selected property. The map will also display all available **GIS layers**. The GIS performs spatial geo-processing automatically to highlight property restrictions such as proximity to wetlands, flood zones, historical districts, etc. A list will be shown in the **Property Restrictions** box located above the map.

- 8.2 Click the **Select Property** button to manually select a property by simply clicking on the map.



All permit, plan review, and inspection data related to the selected property are retrieved automatically.

- 8.3 Use the GIS tool bar to navigate the map, zoom in and out, pan, go to previous or next extents, go to full extent, measure distances, identify map features, draw on the map and print.

- 8.3.1 Zoom: The plus and minus symbols will allow you to zoom in and out of the map
- 8.3.2 Pan: This will allow you to click and drag the map around
- 8.3.3 Extents: These will go back to your previous view, forward to your next view, or you can click the globe to view the full extent of your map
- 8.3.4 Measure: This will allow you to measure the distance between 2 or more points
- 8.3.5 Identify: This will pop up a window with more information when you click on any property
- 8.3.6 Draw: You can manually draw notes onto the map
- 8.3.7 Print: Print the map

9 Personnel

The Personnel tab is an area which allows for contractor, engineer, architect, and utility creation as well as access to the user security and settings windows for administrators.

User Name	Plan Review Name	Manager
Admin	Police	<input checked="" type="checkbox"/>
Admin	Building	<input checked="" type="checkbox"/>
Admin	Building	<input checked="" type="checkbox"/>
Admin	Zoning	<input checked="" type="checkbox"/>
Admin	Health	<input checked="" type="checkbox"/>
Admin	Engineering	<input checked="" type="checkbox"/>
Admin	Historic	<input checked="" type="checkbox"/>
Admin	DPW	<input checked="" type="checkbox"/>
Admin	WPCA	<input checked="" type="checkbox"/>
Admin	Traffic and Parking	<input checked="" type="checkbox"/>
Admin	City Plan	<input checked="" type="checkbox"/>
Admin	Police	<input checked="" type="checkbox"/>
Admin	CAO	<input checked="" type="checkbox"/>
Admin	CAO	<input checked="" type="checkbox"/>
Admin	Traffic Revenue	<input checked="" type="checkbox"/>
Admin	Legislative Services	<input checked="" type="checkbox"/>
Admin	Licenses	<input checked="" type="checkbox"/>
ALucas	Legislative Services	<input checked="" type="checkbox"/>
ARizzo	Building	<input checked="" type="checkbox"/>
ARizzo	Zoning	<input checked="" type="checkbox"/>
ARizzo	Health	<input checked="" type="checkbox"/>
ARizzo	Engineering	<input checked="" type="checkbox"/>
ARizzo	Historic	<input checked="" type="checkbox"/>
ARizzo	Licenses	<input checked="" type="checkbox"/>
BBellamy	Building	<input checked="" type="checkbox"/>
BBellamy	Zoning	<input checked="" type="checkbox"/>
BBellamy	Fire	<input checked="" type="checkbox"/>
BBellamy	Health	<input checked="" type="checkbox"/>
BBellamy	Engineering	<input checked="" type="checkbox"/>
BBellamy	Historic	<input checked="" type="checkbox"/>
BBellamy	DPW	<input checked="" type="checkbox"/>
BBellamy	WPCA	<input checked="" type="checkbox"/>
BBellamy	Traffic and Parking	<input checked="" type="checkbox"/>
BBellamy	City Plan	<input checked="" type="checkbox"/>
BBellamy	Licenses	<input checked="" type="checkbox"/>

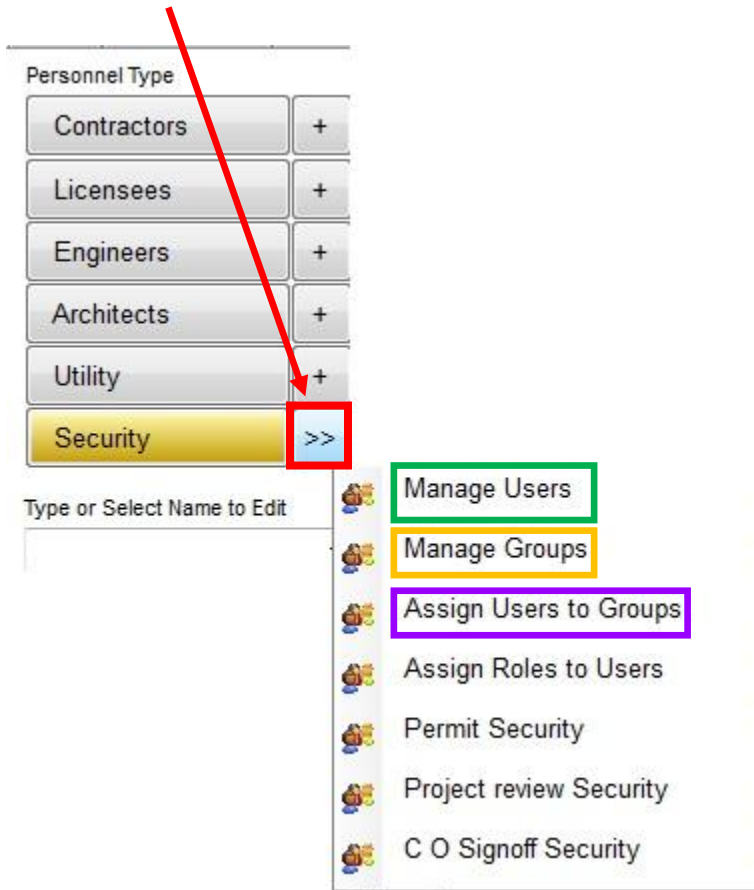
9.1 Enter the name of the person you wish to edit in the **Type or Select Name to Edit** box. It will find any name that is currently sitting in the database and choosing one of these members will bring his/her editable information.

9.2 Click the "+" sign next to the contractor button to create a new contractor with the contractor creation form to the right. Fill in the appropriate information including the license information and select the save button when ready.

9.3 To add an engineer, architect, or utility simply click the "+" sign next to the corresponding button and, as with the contractor creation form, fill in the basic information and save.

10 Personnel: User Security

Click the ">>" button next to the **Security** button to Manage Users, Manage Departments, Assign Users to Departments, access Permit Security, Plan Review Security, and CO signoff security.



Only administrators have the ability to work with user security.

10.1 Select **Manage Users** to Add a New User. Enter Name, Password, and E-Mail then click the "Add" button to create a new user.

10.2 **Manage Groups** allows you to add or delete departments. Click on the **Assign Users to Groups** button to link a user to a specific department. Select the User you wish to assign and then select the department the user is being assigned to. Click **Assign** when finished.

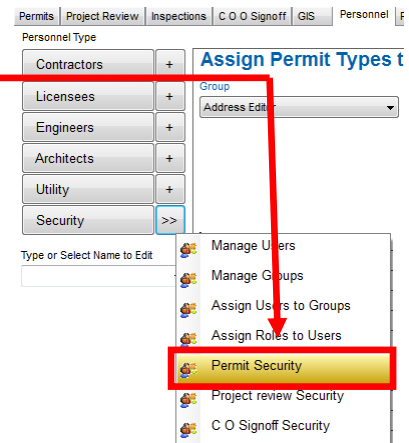
Assign Users to Groups

User: Group:

Assign

User Name	Group Name
ACampbel	Police

- 10.3 Select the **Permit Security** button to link a department with a permit type. Choose the Group and Permit Type you wish to link and then select **Assign**. This allows specific users within a group access to permit creation and, without a link between a department and permit type, users within specific departments may or may not have access to certain permit type creation.



Assign Project Review Types to Users

User: ACampbel Project Review Type: Building Manager: ☐ **Assign**

User Name	Plan Review Name	Manager
ACampbel	Police	<input type="checkbox"/>

- 10.4 To assign a project review type to a specific user click on the **Project Review Security** button. First select the desired user and then click the desired project review type, finish by selecting **Assign**.



Assign Permit Types to Groups

Group: Address Editor Permit Type: Address **Assign**

Group Name	Permit Type
Admin	Building

- 10.5 Follow the same steps as above for assigning users to **CO Signoff Security** and finish by selecting **Assign**.

Assign COSignOff Types to Users

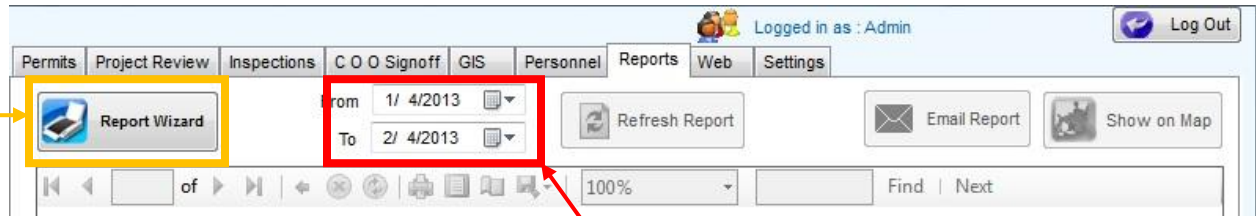
User: ACampbel CO-SignOff Type: Building **Assign**

User Name
Admin



11 Reports

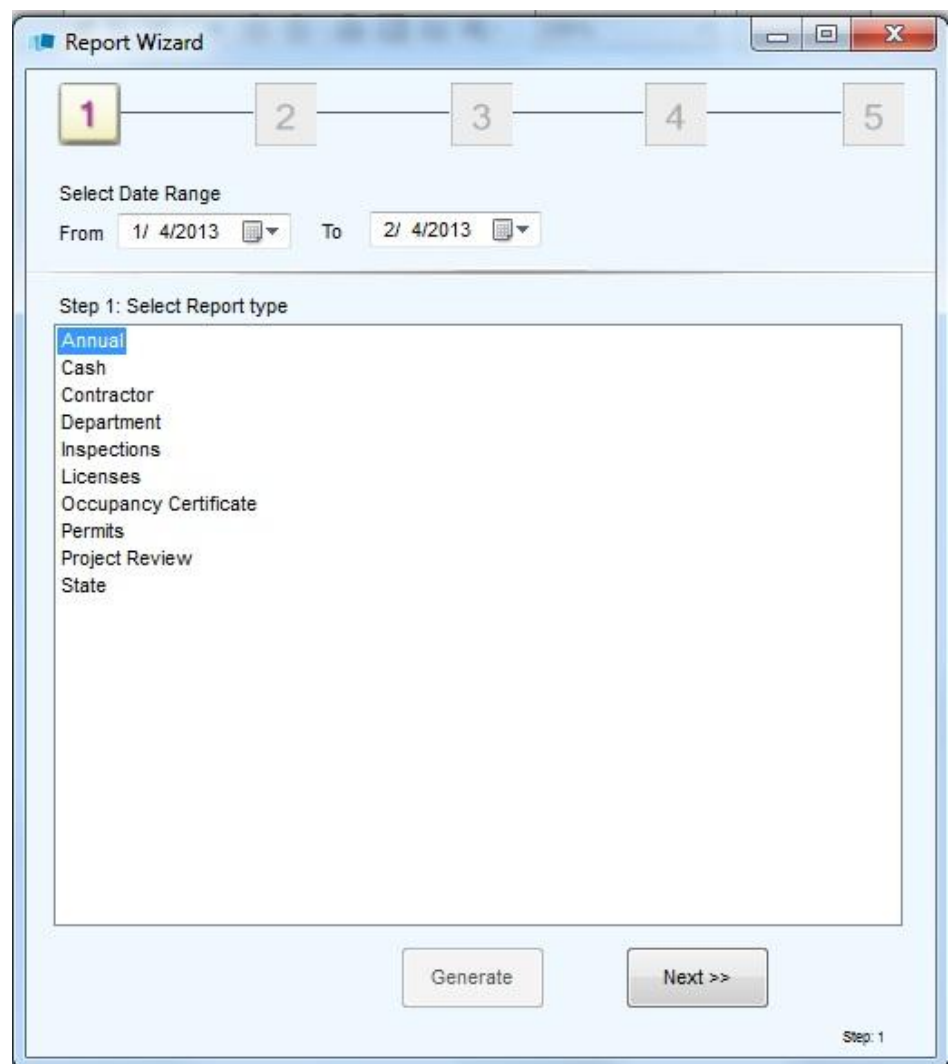
The reports will give you a general or detailed overview of all activity done within a specific time period.



- 11.1 Select the report time frame from the **Calendar dropdown** to determine the "From Date" and "To Date". Click on the Month to enable a dropdown of all months in a year. Click the year to increase or decrease the year increment.

- 11.2 Select the **Report Wizard** button.

- 11.3 Select your Report Type then hit "Next."



- 11.4 Depending on the report you are generating, once you select another report criteria you will either have the option to select "generate" or the option to select both "Next" and "Generate". If you select "Next" again you will be able to narrow down your report selections further before generating.

The screenshot shows the 'Report Wizard' window. At the top, a progress bar indicates five steps: Step 1 is active, Step 2 is highlighted in yellow, and Steps 3, 4, and 5 are marked 'Not Applicable'. Below the progress bar, the 'Select Date Range' section shows 'From 1/ 4/2013' and 'To 2/ 4/2013', each with a calendar icon. The main area is titled 'Step 2: Select First Report Filter' and contains a list box with three items: 'Community Development', 'Inspectional Services' (which is selected and highlighted in blue), and 'Public Works'. At the bottom, there are two buttons: '<< Previous' and 'Generate'. The bottom right corner of the window displays 'Step: 2'.



- 11.5 Use the Report Navigation tool bar to **Browse Report Pages**; **Print**; **Select Page Preferences**; **Export as Excel, Word or PDF Documents**; and **Zoom**.

Report Navigation toolbar: 1 of 1, Print, Export, Zoom (100%), Find, Next

State of Connecticut

City of New Haven

200 Orange St. Tel. (203) 946-8045 - Fax (203) 946-8049

Building Department
ANNUAL REPORT

1/4/2013

From:

To: 2/4/2013

Building Permits

Type of Permit	Number of Permits	Fees Collected	Construction Cost
Demolition	2	\$75.00	\$0.00
New Construction-Residential	1	\$0.00	\$0.00
Porch	1	\$80.26	\$0.00
Roofing	1	\$0.00	\$10,000.00
Garage	1	\$30.00	\$0.00
Addition	1	\$50.00	\$0.00
Antennas	1	\$50.26	\$0.00
	8	\$285.52	\$10,000.00

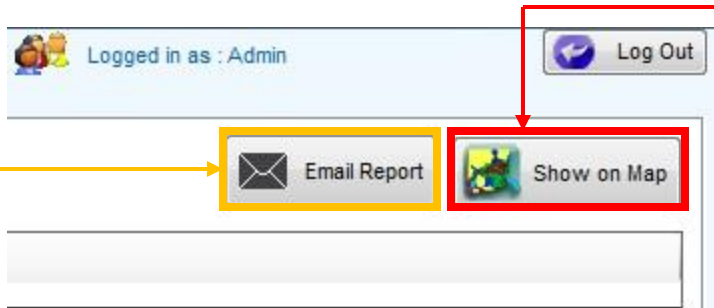
- 11.6 If the report generated has individual record information you may click the **Pin** link provided on each row to be taken directly to that permit form.

Report Navigation toolbar: 1 of 1, Print, Export, Zoom (100%), Find, Next

Date From: 1/4/2013 Date To: 2/4/2013

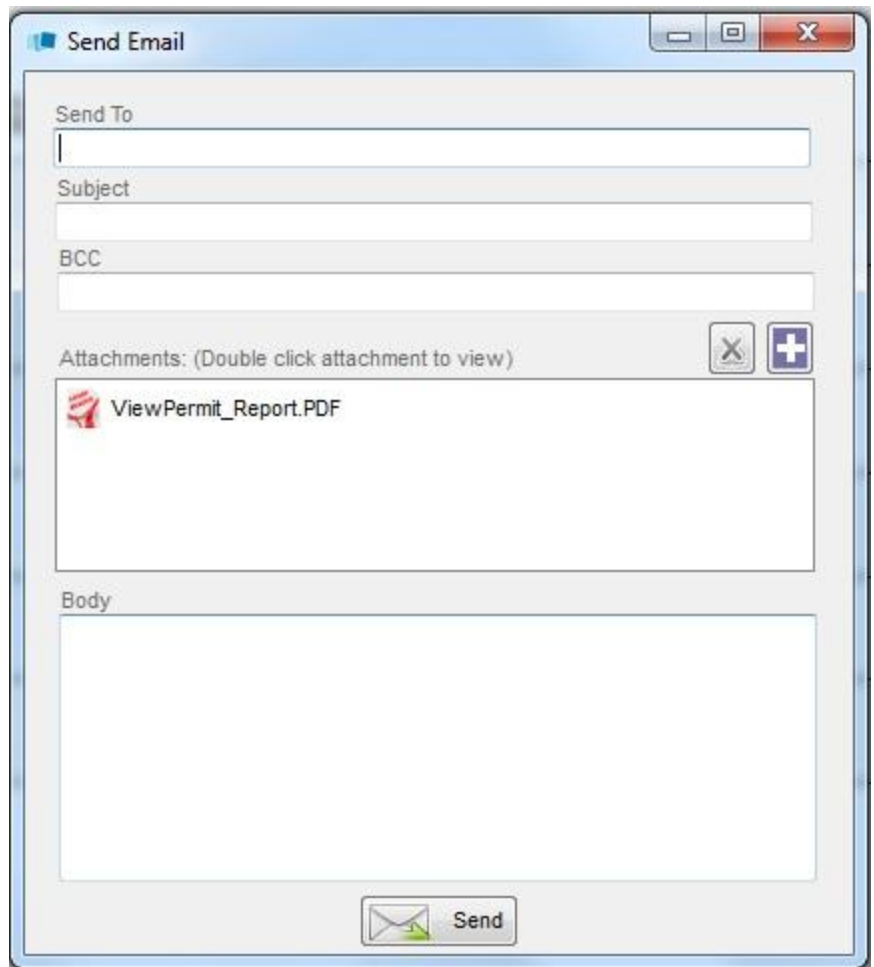
PIN	Owner Name	Permit For
B-13-2	MARTIR JORGE	New Construction-Residential

Number of 1 Permits:



11.7 The **Show on Map** feature allows users the ability to create reports and then generate a map detailing the location of each permit. This feature is a great way to see patterns and trends across the municipality and is another way for users to make informed decisions.

11.8 You can email a report as an attachment by clicking the **Email Report** button.



12 Web Applications Manager

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The Web Applications Manager contains four logs. The **New Applications** log lists applications that have been submitted via the web application. The **Issued Online Permits** log shows applications that have been issues online. The **Incomplete Applications** log lists those applications filled out by the online user but marked incomplete. The final log, **Online Inspection Requests**, lists requests for inspections that come through the web application.

- 12.1 Under **New Applications** double click a specific entry in the log to view it under the permit tab as a permit application. You will then be given the opportunity at the bottom of the form to accept or mark the application incomplete. Accepting the application will add it to the tree view on the left under the address it was submitted under. Marking an application incomplete will list the application under the **Incomplete Applications** log in the web applications manager.
- 12.2 The web applicants' e-mail is listed under "Applicant Email" on the permit form. This allows for town officials to email applicants to either send necessary information to be filled in by the official or the ability to let the applicant know that the permit application will need to be resubmitted with the necessary changes.
- 12.3 Double click on an incomplete application in the **Incomplete Applications** section to review the application once a web applicant has supplied sufficient information or to take a second look at the application.

- 12.4 Select the **Schedule** button on a particular pending inspection in the **Online Inspection Requests** log to open the inspection form. This form automatically displays information added by the web users and gives you the ability to edit this information and choose the inspector.

Online Inspection Requests (2)

PermitNumber	Street	HouseNo	InspectionDate	Time	Type	InspectionType	ApplicantName	ApplicantPhoneNo	Inspector	Schedule	Delete
B-12-377	ACADEMY ST	10	11/5/2012	1:00PM - 4:30PM	Regular	Waterproofing	Hisham 2 Shamas 2	617-577-9000	hisham@viewpoint-g...	Schedule	Delete
B-12-377	ACADEMY ST	10	11/20/2012	8:30AM - 12:00PM	Regular	Above Ceiling	Hisham 2 Shamas 2	617-577-9000	hisham@viewpoint-g...	Schedule	Delete

Appointment

Type: **Permit Inspection**
 Subject: **Waterproofing**

10 ACADEMY ST
 Inspector: **[Dropdown]**

Permit #: **B-12-377**

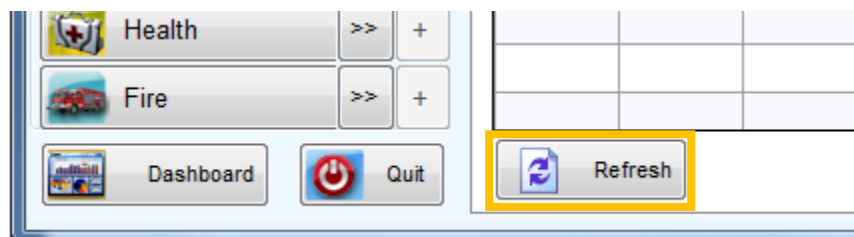
Start Time: **11 / 5 / 2012** **8:00 AM**

End Time: **11 / 5 / 2012** **9:00 AM**

Notes

Click **Save and Close** in the top left corner of the form to add the inspection to the inspections calendar within the inspection tab. Click **Delete** to remove this inspection once in the pop-up form or by clicking the delete button in the inspection log. You can also click **Inspect Now** to be brought to the Inspections tab for this record.

- 12.5 Use the **Refresh Button** at the bottom of the web applications section to update the logs.



13 Settings

The Settings window is where much of the data seen throughout the software is located. Each municipality has their own data needs and this window allows for a certain level of customization. For example, this is where the town administrators are able to decide what types of inspections will take place for a building permit, what the fee structure is going to be for certain permit types, and which "fixtures" are going to be added to fixture dropdowns in mechanical, gas, plumbing, and electrical permits.

Permits Project Review Inspections C O O Signoff GIS Personnel Reports Web Settings

ViewPermit Connected to: ViewPermit_Test

New / Edit >> Relationships >> Fee Structure Inspection Types Permit Type Expir. System Log

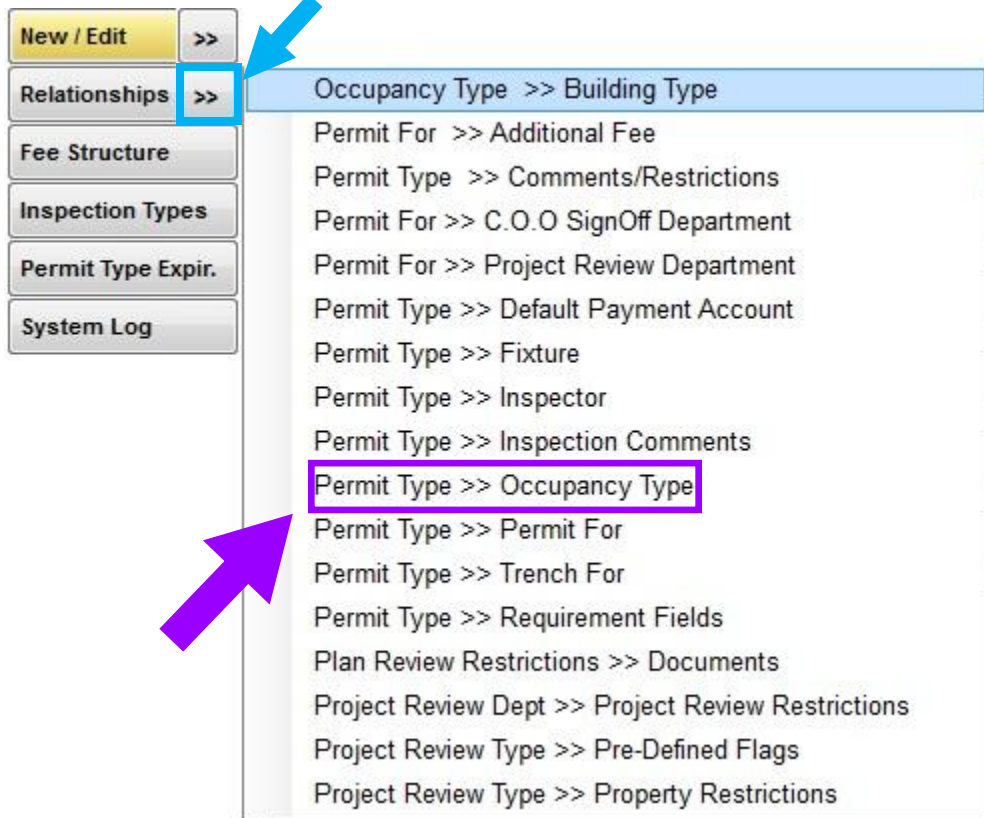
Enter New Permit For ☐ Express

Permit For	Express
Addition	False
Address Inspection	False
Administrative Appeal	False
Amusement/Entertainment/Exhibition	False
Antennas	False
App to BOA	False

- 13.1 First, you can take a look at the new/edit section and decide what data will best reflect your municipality's needs. The data entered will eventually be linked to other pieces of data in the relationships field, allowing for the software to use the correct data at the correct time.

For example, when filling out the "building type" field keep in mind that the data will eventually be linked to occupancy type. This relationship allows for a building type of "multi-family" to be linked to a "residential" occupancy type. There would most likely be no need to establish a link between "multi-family" and a "commercial" occupancy type as people don't usually live in commercial buildings. This is where the importance of relationships comes into play, as detailed below.

- 13.2 Once you have entered your data into the **New/Edit** fields it is time to establish the relationships noted above by selecting the ">>" button next to the **Relationships** button. This will allow for a level of customization that makes the software even more efficient.



For example, instead of having every single building type show up for every permit type you need only to connect relevant building types to certain permit types by selecting the **Permit Type >> Occupancy Type** option. It is important to familiarize yourself with the permit forms while setting up these connections in order to better understand how the process works and where the data you are now entering will be showing up on the permit forms.

- 13.3 The third aspect of the settings window is the fee structure window. Click on the **Fee Structure** button to open this window and customize your municipality's fee structure. First select the **Permit Type** from the dropdown. This dropdown lists all the permit types available for creation. By selecting an electrical permit type, for example, you will trigger the occupancy types for that permit type, these will populate on the left. If you were to select a residential occupancy type the subsequent "Permit For"s that were added earlier under the **New/Edit** fields would show up. Set both a minimum fee and an incremental fee and decide which fees will show up for specific projects (permit for). The same can be done for all occupancy types within a permit type and also for all permit types that are available to your specific municipality.

ViewPermit Connected to: ViewPermit_Test

Fee Structure Settings

Step 1: Select Permit Type

Permit Type: Building

Step 2: Select Occupancy Type then Enter Desired Fee Amount

Occupancy Type / Road Type: Building, Residential

Permit For	Minimum Fee	Incremental Fee
Addition	50.26	27.26
Antennas	50.26	27.26
Antennas	50.26	27.26
Boiler/Furnace Replacement	50.26	27.26
Deck	50.26	27.26

- 13.4 The fourth section of the settings module is **Inspection Types**. This allows you to choose which items will appear on the inspection checklist within the **Inspections** tab. You will first select a **Permit Type** from the dropdown at the top and then a **Permit For** from the list. You can then select a currently existing inspection type or select one from the dropdown list and add. Once you select your inspection type from the list you can choose a **Checklist Item** from the dropdown to add it to that inspections checklist.

Permits | Project Review | **Inspections** | C O O Signoff | GIS | Personnel | Reports | Web | Settings

ViewPermit Connected to: ViewPermit_Test

Step 1: Select Permit Type

Permit Type: Building

Step 2: Select Permit For then Select Inspection Types

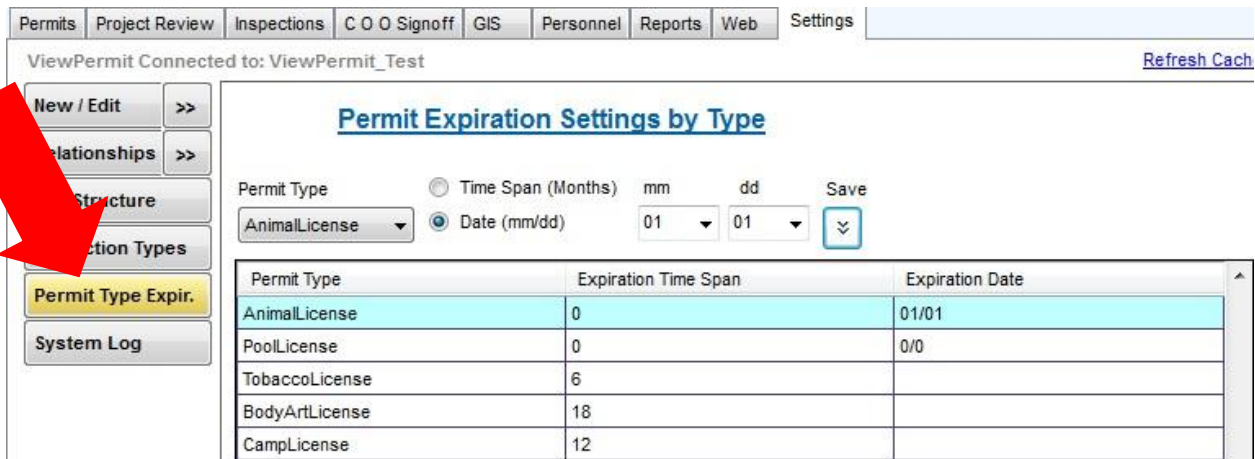
Permit For: Addition, Antennas, Deck, Demolition, Dorrner

Inspection Type: Alarm, Above Ceiling, BACKFILL, CO, Decks, Demolition

Add Checklist Items: Above Ceiling

Framing Materials: Type, Size, Dimensions, Span, Condition, Grade, Location, Spacing and Alignm... Piers

- 13.5 The fifth section within the setting module is called the **Permit Type Expiration** section. Since most municipalities require a certain criteria for expirations of permits the software allows users to go in and adjust these criteria based on local by-laws. This feature is especially important for those municipalities who issue licenses based on time from issuance opposed to a set date in time.



Permits | Project Review | Inspections | C O O Signoff | GIS | Personnel | Reports | Web | Settings

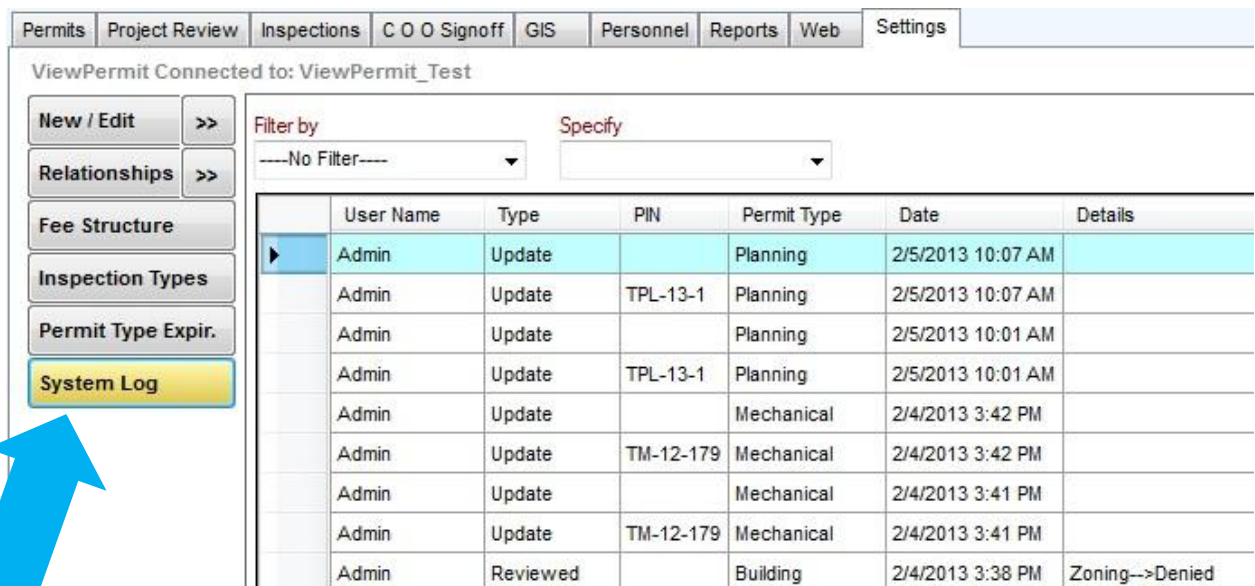
ViewPermit Connected to: ViewPermit_Test [Refresh Cache](#)

Permit Expiration Settings by Type

Permit Type: ☐ Time Span (Months) mm dd ☐ Date (mm/dd) 01 01

Permit Type	Expiration Time Span	Expiration Date
AnimalLicense	0	01/01
PoolLicense	0	0/0
TobaccoLicense	6	
BodyArtLicense	18	
CampLicense	12	

- 13.6 The final feature within the setting module is the **System Log**. This log allows administrators the capability to go in and see every action taken by each individual user. This is important for keeping tabs on what has been entered into the system and who has been doing what.



Permits | Project Review | Inspections | C O O Signoff | GIS | Personnel | Reports | Web | Settings

ViewPermit Connected to: ViewPermit_Test

Filter by: Specify:

	User Name	Type	PIN	Permit Type	Date	Details
▶	Admin	Update		Planning	2/5/2013 10:07 AM	
	Admin	Update	TPL-13-1	Planning	2/5/2013 10:07 AM	
	Admin	Update		Planning	2/5/2013 10:01 AM	
	Admin	Update	TPL-13-1	Planning	2/5/2013 10:01 AM	
	Admin	Update		Mechanical	2/4/2013 3:42 PM	
	Admin	Update	TM-12-179	Mechanical	2/4/2013 3:42 PM	
	Admin	Update		Mechanical	2/4/2013 3:41 PM	
	Admin	Update	TM-12-179	Mechanical	2/4/2013 3:41 PM	
	Admin	Reviewed		Building	2/4/2013 3:38 PM	Zoning-->Denied

ViewPermit

Innovative permit management

